NEWSPAPER

Advertising Age

April 26, 1993

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02019243 10305 DEC93
ASST MNG EDITOR
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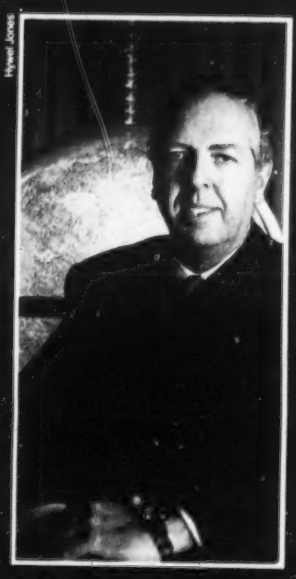
Crain's International Newspaper of Marketing • In Two Sections • Section 1 • $2.50 • $3.00 in Canada • £5.00 in U.K.

COMING NEXT WEEK



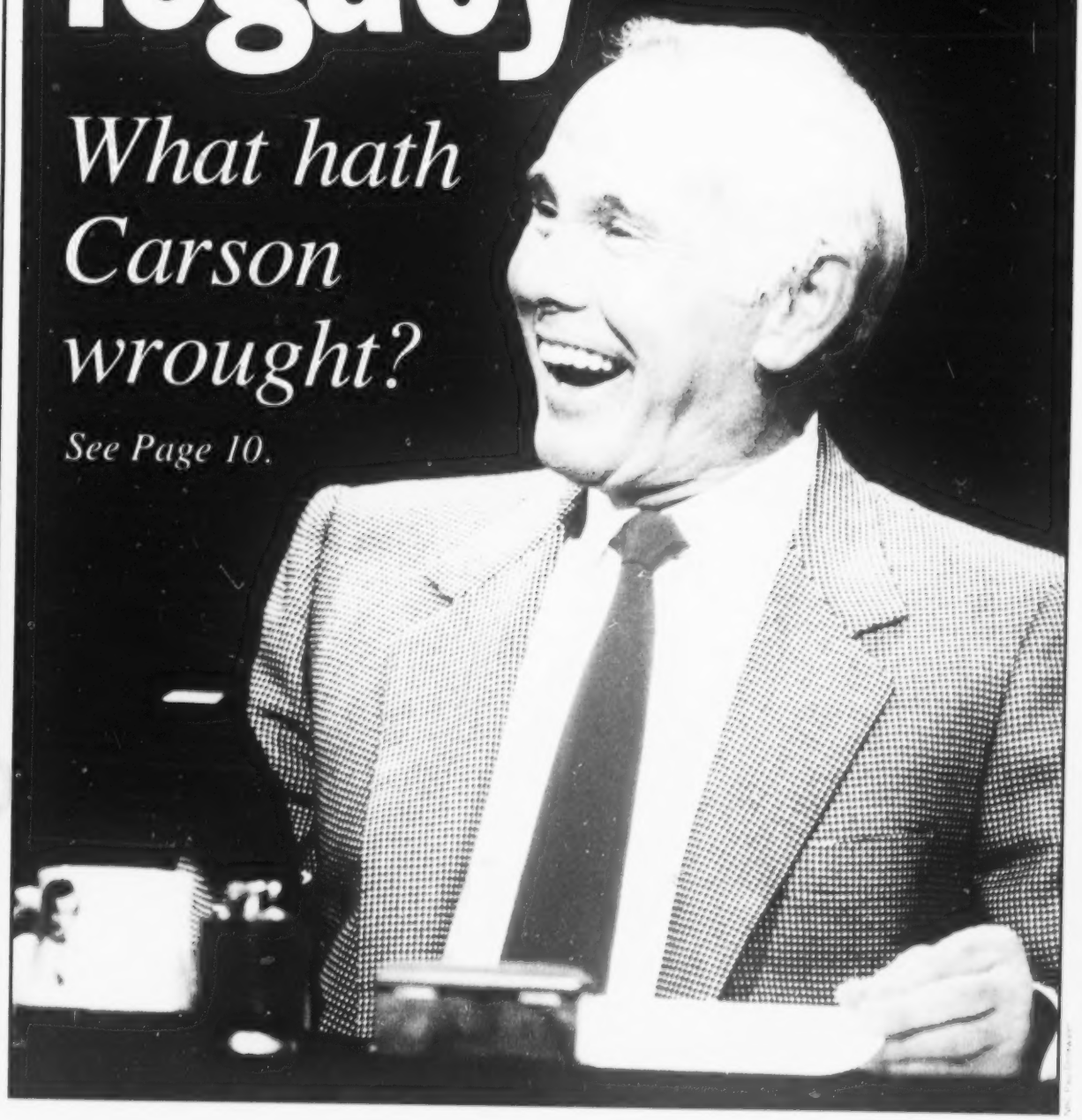
Advertising Age International

■ Premiere Issue: Ian Martin, chief executive of U.K.-based Grand Metropolitan, talks about the company's plans to take the Pillsbury Doughboy and Green Giant around the world. *Advertising Age International*, a new monthly supplement, makes its debut April 27, focusing on news and trends in global marketing.

Late night legacy

What hath Carson wrought?

See Page 10.



NEWS SUMMARY

■ **American Express** shifted charge card division direct marketing work from Ogilvy & Mather Direct to Bronner Slosberg Humphrey and Wunderman Worldwide. 1

■ **"Magic" Johnson** will star as spokesman for SkyBox International trading cards in a $15 million campaign. 1

■ **Philip Guarascio's** future as top adman at General Motors, following boardroom-directed changes, is the subject of widely differing industry speculation. 1

■ **Omnicom Group** may merge Tracy-Locke into either DDB Needham Worldwide or BBDO Worldwide. 3

■ **Procter & Gamble** is planning the fall introduction of a Pert shampoo line extension for preteens. 3

■ **Sears'** continued problems with its merchandise group are expected to draw criticism at the annual meeting. 3

■ **Alfa Romeo's** $45 million account is in review. 3

■ **Pepsi-Cola Co.** is considering adding a diet version of its clear Crystal Pepsi, now in test markets. 4

■ **United Airlines'** quick action shortened American Airlines' lead in announcing a new low-fare plan. 4

■ **Anheuser-Busch** is aiming at the seniors market with its non-alcoholic O'Doul's brew. 4

■ **Ketchum Advertising's** New York office named Steven Penchina chairman and William Perkins president. 30

■ **Earth Day** this week will find environmental seals of approvals for products still scarce. 41

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Vol. 63, No. 16—ADVERTISING AGE (ISSN 0001-8899) is published weekly (except for a special issue the fourth week in September and a combined year-end issue in December) by Crain Communications Inc. at 740 Rush Street, Chicago, Ill. 60611-2590. Second-class postage paid at Chicago and additional mailing offices. Postmaster: Send address changes to ADVERTISING AGE, Circulation Department, 965 E. Jefferson, Detroit, Mich. 48207. $2.50 a copy, $84 a year, $134 two years. Add $151 per year for air delivery to Europe & Middle East. Add $79 for surface mail to all other foreign countries. WILLIAM STRONG, VP-circulation; DAVE KELLEY, circulation manager. Four weeks' notice required for change of address. Address all subscription correspondence to Circulation Department, Advertising Age, 965 E. Jefferson, Detroit, Mich. 48207-3185; 1-800-678-9595. Microfilm copies are available from University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Mich. 48103. Microfiche copies are available from Bell & Howell, Micro Photo Division, Old Mansfield Rd., Wooster, Ohio 44691. AD AGE is available for electronic retrieval on the NEXIS® Service, Mead Data Central, Inc., P.O. Box 933, Dayton, Ohio 45401 (800 227-4908).

ABP MPA ABC CMPA

Bauer hopes to clean up with 'Soap Opera Update'

Publisher wants to buy into hot magazine segment

By Scott Donaton

Bauer Publishing Co. is negotiating to acquire *Soap Opera Update* and make a run at K-III Communications Corp.'s category kingpin, *Soap Opera Digest*.

Bauer, publisher of *First for Women* and *Woman's World*, has been conducting newsstand tests in several markets, including Rochester and Buffalo, N.Y., industry executives say, to determine ways to boost sales of *Soap Opera Update*.

The 4-year-old every-other-weekly is published by privately held Soap Opera Update Magazine. It has an unaudited circulation of 200,000 and is sold primarily at newsstands and supermarket checkout counters.

"We are talking with them, we are testing, but there is no acquisition yet or firm date for it," said Hubert Boehle, exec VP-chief operating officer of Bauer.

"We're in negotiations; that's all I can tell you," said Jerome Shapiro, *Soap Opera Update* president and publisher.

If Bauer enters the field, it will follow supermarket tabloid publisher Enquirer/Star Group, which launched the weekly *Soap Opera Magazine* in October.

Bauer could use *Soap Opera Update* to take on *Soap Opera Digest*.

The surge of interest in magazines covering daytime TV dramas can be traced to K-III's purchase last year of eight consumer magazines, including *Soap Opera Digest*, from Rupert Murdoch's News Corp. To the surprise of many, financial documents revealed *Soap Opera Digest* to be the most profitable title.

Soap Opera Digest, an every-other-weekly with a rate base of 1.3 million, had reported profits of $15.7 million in 1990 on revenues of $38 million. *Soap Opera Digest's* ad pages rose 1.6% to 420 last year, Publishers Information Bureau said.

K-III also owns the digest's sister publication, *Soap Opera Weekly*, which has a rate base of 500,000.

K-III has said both magazines would be profitable even without selling a single page of advertising. Soap magazines are relatively inexpensive to produce, and because the titles are sold primarily at single-copy outlets, publishers spend little on subscription acquisition efforts.

At the time of the K-III purchase, "we were called the jewels in the crown, and I'm sure many people took a look and said, 'Hey, interesting category,'" said Elaine Shindler, publisher of *Soap Opera Digest* and *Soap Opera Weekly*.

Enquirer/Star Group officials said they were unable to discuss the performance of its *Soap Opera Magazine* because the company is in the middle of a public stock offering. But executives close to the company said the weekly is selling between 250,000 and 300,000 copies. □

Saatchi taps Timon to oversee big piece of P&G Euro business

By Gary Levin

Clay Timon, the former worldwide ad director at Colgate-Palmolive Co., has joined Saatchi & Saatchi Advertising in Paris to run a significant piece of Procter & Gamble Co. business.

Mr. Timon, 48, has been named to the new post of regional VP for Europe, the Mideast and Africa, and will move to Paris by late May. He's responsible mainly for P&G's Ariel detergent business, a direct competitor to many of the brands marketed by Colgate. The Ariel account is estimated at more than $100 million; it's the largest advertised detergent brand in Europe.

"I've spent all my career focused on global and international" advertising, said Mr. Timon, who's held several agency posts.

The new job "is an opportunity to get back and get deeply involved with everything happening in Europe," he said, referring to the economic unification of the European Community.

Timon

"I've always loved advertising," Mr. Timon said, "and while I was not specifically looking to get back into agencies, I've been particularly wanting to spend this part of my career working in Europe and with what's going on there."

Mr. Timon "has tremendous experience in the area of getting the best creative across borders," said Edward Wax, chairman of Saatchi & Saatchi Advertising Worldwide. "He comes to us from a similar culture and is used to working on regional brands."

Mr. Timon left Colgate, where he was VP-director of worldwide advertising, in 1990. He later opened Clay Timon Co., a "consultancy to consultants."

Before Colgate, Mr. Timon held posts at several agencies, including Doyle Dane Bernbach (now part of DDB Needham Worldwide) and McCann-Erickson Worldwide. □

FSIs play Olympian role for A-B

'Bud Summer Games' promotion to place 220M game tix

By Ira Teinowitz

Anheuser-Busch will make unprecedented use of newspaper inserts as part of a $25 million Summer Olympics promotion for the Budweiser line.

The "Bud Summer Games" promotion will place 220 million game tickets in free standing inserts and in ads in magazines including *Time, Sports Illustrated, People* and *Entertainment Weekly*.

Consumers will match numbers in the inserts and ads with numbers on in-store displays.

The promotion's $8.5 million in prizes include a $1 million grand prize, Dodge minivans, Jeep Cherokees, Toshiba electronics, Kawasaki jet skis, Wilson sporting goods, Weider gym equipment, Trek mountain bikes and apparel.

The promotion starts in mid-May and coincides with A-B's corporate sponsorship of the U.S. Olympic team and NBC's Summer Games coverage. But promotion materials won't directly mention the Olympic connection.

Waylon Co., St. Louis, handles point of purchase; D'Arcy Masius Benton & Bowles handles advertising.

While A-B pushes the Bud Games, Miller Brewing Co. will offer "Miller Time" theme promotions via Leo Burnett USA, Chicago, with POP from Louis London Advertising & Sales Promotion, St. Louis.

An inflatable-raft promotion breaks in mid-May and runs through Memorial Day, while volleyballs and T-shirts will be offered through the Fourth of July (Miller Lite is sponsor of the U.S. Olympic volleyball team). Discounts for compact discs will also be available in July.

Coors Brewing Co. earlier announced plans for a talking can promotion (AA, March 30). □

Late night legacy

A roster of 'Tonight Show' competitors are ready to enter the fray as NBC makes room for Jay to take over from legendary Johnny

By Joe Mandese

"Heeeeeeeeeere's Johnny."

The phrase has introduced 4,531 original telecasts of the "The Tonight Show Starring Johnny Carson."

But starting next month, it will be replaced by cries of "Where's Johnny?" as millions of bleary-eyed but loyal late night viewers wean themselves off Mr. Carson and onto Jay Leno, or any of the host of other contenders for the late night talk-show crown.

"It's going to be a period of flux, both from a viewer's and an advertiser's standpoint," said Joel Segal, exec VP-director of national broadcast at McCann-Erickson Worldwide, New York. "NBC has a built-in following. The show will still be called 'The Tonight Show.' But it won't be the same as it was with Johnny Carson."

"Carson is a once in a lifetime situation," said Arnie Semsky, exec VP-director of media and programming services at BBDO Worldwide. "To find somebody who could be that accepted over such a long period of time is unprecedented, and we probably will never see anything like that again."

With such an act to follow, and with a large field of new competitors coming into the late night talk-show arena, buyers are naturally skeptical about NBC keeping its hold on the daypart, which it has dominated for more than 30 years.

"I think it's up for grabs," said Betsy Frank, senior VP-director of TV information and new media for Saatchi & Saatchi Advertising. "There are a lot of opportunities, both for the players that are in there now and the ones that are about to enter."

Indeed, even before Mr. Carson announced his retirement last May, the competition was having an impact on the venerable series. For the 1990-91 season, the audience for "The Tonight Show Starring Johnny Carson" fell to a 4.9 Nielsen rating and 16 share, the lowest ratings in its 30-year run.

While the show's ratings are up marginally this season, the field of late night alternatives is about to grow even more crowded as Fox Broadcasting Co. re-enters the daypart with a "comedy/-talk show" starring actor Chevy Chase. And a bevy of new syndicated late night talk shows are ready to make their debuts.

The combined impact of Mr. Carson's retirement and the new competition will redistribute viewer and advertiser loyalties, Saatchi's Ms. Frank said.

"It probably will result in a redistribution of the available audience, and that will have an impact on where advertising dollars are spent," she said.

That's not good news for NBC, which is already losing share in the Big 3's $400 million late night advertising marketplace.

In 1991, NBC's share of late night network ad revenues fell 1.3 points to a 66.4 share, according to Arbitron Co.'s MediaWatch. CBS was down 1.2 points to an 11.4 share, and ABC was up 2.5 points to a 22.2 share.

For NBC, that was a smaller slice of a smaller pie, because the Big 3's late night take declined 9.2% to $397.3 million in 1991.

While part of that decline was attributable to the recession, some was money shifting to other alternatives, including syndicated TV shows like Paramount Communications' "The Arsenio Hall Show."

In 1991, late night spending on the Big 3 fell at a faster rate than other dayparts, which dropped 6.7% overall.

Branford Marsalis with Jay Leno

Arsenio Hall

Tim Patrick

Johnny Carson

Alan Singer/NBC

David Letterman

Chevy Chase

Key advertising categories slashed their late night network budgets last year. The No. 1 spender, imported passenger cars, was down 31.7% to $32.8 million.

Indeed, Toyota Motor Sales USA, the largest import advertiser on late night, cut its late night budget 41.5% to $11.3 million. No. 2 import car marketer American Honda Motor Co. dropped 42% to $5.4 million; No. 3 Nissan Motor Corp. USA was down 66% to $5.2 million; and No. 4 Mazda Motor of America, down 62.8% to $4.1 million.

Despite such cuts, import buyers remain upbeat about the daypart and about "The Tonight Show" in particular.

Honda agency Rubin Postaer & Associates, Los Angeles, reconfirmed its second-quarter scatter buys on "The Tonight Show," said Chuck Bachrach, senior VP-director of national broadcast. Mr. Bachrach said he isn't concerned about the transition to Mr. Leno.

"We believe Jay Leno is an excellent choice, and we don't see it having a negative impact on the show," he said.

"Late night is important to us, and 'Johnny Carson' is one of the better properties in late night," said Jan Thompson, VP-marketing at Mazda. "Johnny is the only one with a large audience, and 'The Tonight Show' is a big part of our late night buy. It's always been good for us."

She said Mazda also isn't overly concerned about the late night succession, since the demographic delivery of the show might even improve.

"When [Mr. Leno] has guest-hosted, the ratings haven't fallen. He's been strong," Ms. Thompson said. "With Jay, there is the possiblity of a younger viewer. Johnny started to skew just a little older. Johnny is 40-something. Jay is 30-something. Isn't that what everyone wants today?"

Late night buyers say the daypart's ad spending cuts were due partly to its rapid growth in recent years and to the softer prices available in other dayparts, including prime time.

"Prime time is usually the bellwether, and other dayparts' relation to prime time usually determines how much money goes in there. There's no doubt that the softening of prime-time prices has caused money to move from late night into prime," said BBDO's Mr. Semsky.

As a result, late night prices have fallen significantly during the past year.

According to Ephron, Papazian, Ephron's NetCosts, prime-time household cost per thousand rose 16.3% to $8.57 in the third quarter of 1992 compared to the fourth quarter of 1991. During that same period, late night CPM fell 5.4% to $5.62.

Despite the softening of the late night market, new competitors are entering the daypart, most notably Fox.

Though Fox failed in its first foray with "The Late Show Starring Joan Rivers," which ran from October 1986 to May 1987, Fox executives believe Mr. Carson's retirement represents an irresistible opportunity to re-enter the daypart.

"It's a wonderful opportunity for us," said Jamie Kellner, president of Fox Broadcasting Co. "We tried to go up against Johnny once, and we decided it wasn't a good idea."

But Mr. Kellner said the transition to Mr. Leno will create a void among viewers, talk show guests and advertisers, and Fox plans to capitalize on that opening.

"NBC used to control late night television," he said. "They are no longer in a position to control late night advertising budgets. There no longer is one dominant player in late night television, which is wonderful for us.

"When we come in, our show will be based on its merits; what the advertisers believe the audience poten-

(Continued on Page 44)

Popularity of late night TV personalities

Numbers reflect a quotient determined by dividing a performer's familiarity by his popularity. The highest possible rating is 100; the lowest is 0.

	Adults		Men	Women
	All adults	18-34	18-34	18-34
Chevy Chase:	30	36	41	35
Jay Leno:	25	27	31	23
Johnny Carson:	21	25	32	16
Arsenio Hall:	18	23	16	29
Dennis Miller:	18	20	20	21
David Letterman:	16	24	31	16

Based on written surveys completed by 1,800 respondents in May. Chevy Chase's ranking is based on 1990; all others are from 1991.

Source: Marketing Evaluations, Performer Q

MEDIA MIX

News briefs in print, electronic and alternative media.

Dad sues school over "Channel One." The father of an eighth-grade student filed suit against the Knox County, Tenn., school system over "Channel One." Steven Wallace, in a suit filed in U.S. District Court in Knoxville, alleged the programs and commercials on Whittle Communications' classroom TV network have no educational value and deny his son's rights. Whittle said the suit is between the parent and school board, and wouldn't comment.

Cable company sued over late fees. A $30 million class action law suit has been filed in Chancery Court in Memphis, Tenn., against Memphis Cablevision Co. by three subscribers who contend the company's $10 late fee is illegal. Attorneys for the three say they will enter an injuction plea May 27 prohibiting further assessments and collections of such fees. Dean Deyo, manager of Memphis Cablevision, said he is preparing a response that will be filed by monthend. He said $10 is a fairly common amount for late fees, which don't violate usuary law, as the suit alleges. Attorneys for the plaintiffs say the late fees are higher than reasonable given the cost of services provided, and Cablevision is being unjustly enriched by the late fees.

Event strategy. ABC Entertainment President Bob Iger said "event series" would become a regular feature on ABC's prime-time schedule. Oliver Stone's "Wild Palms" will be the first of three or four series to air during the season, he said. ABC also has committed to an event series being developed by author Judith Krantz. Event series, which air a limited number of episodes on consecutive weeks, differ from miniseries, which air on consecutive nights. "Wild Palms" will open with a 2-hour episode followed by four 1-hour episodes, Mr. Iger said.

Kids' programming at starting gate. ABC announced its Saturday morning children's programming plans. The network added three new half-hour animated series: "The Addams Family," "Goof Troop" and "Wild West C.O.W.—Boys of Moo Mesa." CBS added four half-hour animated series: Steven Spielberg's "Fievel's American Tails," "Disney's the Little Mermaid," "Disney's Raw Toonage" and "The Amazing Live Sea Monkeys." NBC announced its new Saturday morning teen programming schedule last month.

"Roseanne" solid for two more seasons. ABC negotiated a contract extension with "Roseanne" producer Carsey-Werner Co. that will keep the prime-time hit on the network for at least two more seasons. "Roseanne" was the second-highest-rated prime-time series of the 1991-92 season. □

Ad turnaround hinted

Big magazines join niche books in recovery

By Scott Donaton

For the first time in more than two years, big magazines have something to smile about.

Although some smaller, special-interest magazines have fared well during the recession, larger titles are leading what appears to be the start of a comeback.

MEDIA WORKS

Sixteen of the top 20 in ad pages saw pages rise for the first quarter, an about-face from first quarter 1991, when 16 of the top 20 registered declines.

PIB first reported that March pages rose 0.1% from last March to 13,577, marking the second consecutive month of gains (AA, April 13). But it adjusted the numbers after discovering some magazines had five reporting weeks in March this year, up from four weeks last year. With that factored in, pages actually fell 3.2% for the month, PIB said.

For the first quarter, PIB-tracked magazines carried 35,873 ad pages, down 0.9% compared with the same period in 1991. First-quarter ad revenues rose 3.9% to $1.47 billion.

Larger titles are doing better because "as soon as things turn, advertisers want to . . . reach mass market," said Martin Walker, president of Periodical Studies Service, a consultancy.

"It's fair to say the first-quarter results are a sign that bottom has been hit and things are beginning to turn around," he said, "but it's too early to make any optimistic predictions for the year."

Increased spending in the top 10 ad categories also signals a likely turnaround. The top 10 categories (ranked by revenue) accounted for 25,160 pages for the quarter, an increase of 0.4%.

The No. 1 category, automotive, was up 3.02% with 3,948.3 pages. Also posting strong gains were business and consumer services (3,013.3 pages, up 23.5%) and drugs (915.1 pages, up 19.3%), a newcomer to the top 10.

Food fell the most, down 16.6% to 1,559.7 pages. No. 11-ranked cigarettes and tobacco continued its free fall with 641.1 pages, down 41.7%. The category ranked eighth for the period last year.

Magazines below PIB's top 20 had less to cheer about than the bigger books. Of the top 50 titles, only 27 saw pages rise through March. Of the top 100, only 46 were up for the quarter.

Bride's & Your New Home led all magazines after three months with 843 pages, a 4.4% increase. *Business Week* ranked second, up 21.1% to 727.5 pages. *Forbes* also

Top 10 magazine ad categories by revenue

Category	1992 revenue	% chg	1992 pages	% chg
Automotive*	$229,858,356	9.16	3,948.3	3.02
Direct response cos.	$157,072,175	2.39	4,861.1	−0.45
Toiletries	$124,719,698	−8.95	2,490.5	−10.44
Food	$109,244,084	−2.45	1,559.7	−16.62
Business & consumer svcs.	$108,290,951	29.76	3,013.3	23.48
Apparel**	$102,403,599	5.89	3,579.6	−5.05
Travel, hotels & resorts	$93,798,474	6.67	2,898.6	−0.39
Computers & office equip.	$55,682,483	27.26	1,272.3	9.90
Drugs	$47,719,289	33.34	915.1	19.27
Publishing & media	$45,185,292	−5.57	621.6	−2.57

Revenue and page figures are from January-March 1992. *Includes accessories and equipment. **Includes footwear and accessories. Source: Publishers Information Bureau

saw pages rise 21.1% to 685; *Fortune's* 451.7 pages were up 10.5%.

Entrepreneur was the largest monthly with 552.6 pages, a 3.2% increase.

Other mass-market magazines showing strength through March included: *Sports Illustrated*, which carried 512.7 pages, up 12.1%; *New York Magazine*, up 13.3% to 491.8; and *The New Yorker*, carrying 377.6 pages, a gain of 18.8%.

Time maintained a slight lead among newsweeklies with 443.6 pages, a 0.5% increase. *Newsweek* was close behind with 437 pages, an 18.4% gain. *U.S. News & World Report's* 390.6 pages were up 19.4%.

Good Housekeeping also held its lead in the women's service field for the first quarter, despite a 2.3% drop to 371.9 pages. *Family Circle* finished a close second with 357.2 pages, up 2.8%. *Ladies' Home Journal's* pages fell 14.8% to 305.5.

Woman's Day continued on the comeback trail, due in part to a frequency increase to 17 from 15 times per year. Its 282.6 pages were up 39.2%. Rounding out the field were *Better Homes & Gardens* (278.7 pages, down 5.6%), *Redbook* (249 pages, down 3.7%) and *McCall's* (246.3 pages, down 3.1%).

The battle between national Sunday magazines *Parade* and *USA Weekend* raged on as both continued to buck the recession. *Parade's* 215.1 first-quarter pages were up 9.4%. *USA Weekend's* 187.9 pages marked a 25% rise. □

Joe Mandese coordinates MediaWorks.

Magazine ad page leaders

Publishers Information Bureau figures for January through March 1992.

Rank	Magazine	Pages	% chg	Dollars	% chg
1	Bride's	843.02	4.4	16,256,096	6.8
2	Business Week	727.49	21.1	44,248,100	22.2
3	Forbes	665.12	21.1	31,231,392	22.9
4	The Economist	671.83	24.2	7,310,712	47.3
5	Modern Bride	653.31	4.2	11,228,362	11.7
6	TV Guide	634.36	-2.9	71,304,190	-7.7
7	Bridal Guide	625.30	11.3	5,270,254	58.3
8	People	597.47	-9.9	65,968,726	-4.3
9	Entrepreneur	552.55	3.2	6,772,478	17.8
10	Vogue	526.18	-19.5	21,671,025	-18.1
11	Sports Illustrated	512.69	12.1	70,592,130	13.8
12	New York Magazine	491.78	13.3	8,790,693	17.7
13	Golf World	478.00	11.7	4,370,077	18.1
14	Fortune	451.74	10.5	24,741,171	12.4
15	Time	443.62	0.5	72,120,916	10.1
16	Newsweek	437.01	18.4	50,328,459	19.6
17	Yachting	397.11	8.7	2,687,145	17.9
18	U.S. News & World Report	390.62	19.4	35,448,627	28.8
19	American Way	386.74	10.5	5,551,224	4.8
20	Cosmopolitan	386.57	-12.6	26,666,313	-8.4
21	The New Yorker	377.57	18.8	11,042,571	20.4
22	Good Housekeeping	371.92	-2.3	40,175,069	3.4
23	Family Circle	357.18	2.8	32,044,107	9.3
24	Muscle & Fitness	354.23	0.2	6,747,576	4.9
25	Golf Magazine	342.27	-6.9	11,904,892	-4.9
26	Golf Digest	339.29	20.0	19,281,484	17.3
27	W Magazine	332.66	8.6	8,922,302	21.0
28	Elle	323.70	-18.0	11,387,934	-11.6
29	Popular Photography	309.92	-1.9	7,757,988	7.2
30	Ladies' Home Journal	305.52	-14.8	24,146,193	-9.7
31	Financial World	305.36	145.0	7,611,344	173.6
32	Skin Diver	299.66	-12.9	3,238,704	-7.4
33	Salt Water Sportsman	291.10	-3.8	1,926,418	-11.3
34	Parents	290.32	-10.2	13,572,213	-4.6
35	Texas Monthly	287.28	-3.6	3,588,019	4.9
36	Sunset	285.68	-12.5	10,987,536	9.7
37	Glamour	285.45	-21.0	16,656,973	-19.0
38	Rolling Stone	285.44	-4.6	12,674,703	8.1
39	Woman's Day	282.58	39.2	22,785,647	50.7
40	Southern Living	280.39	3.7	16,537,843	11.4
41	Better Homes & Gardens	278.74	-5.6	35,523,292	1.8
42	Architectural Digest	275.54	-2.1	7,727,920	-0.4
43	GQ	272.30	-23.5	8,446,832	-11.0
44	Vanity Fair	269.68	14.4	11,067,017	35.3
45	Skiing	267.99	16.7	5,580,164	19.0
46	Money	267.30	-4.6	18,077,925	-3.1
47	Travel & Leisure	250.98	-22.6	12,094,149	-7.6
48	Redbook	248.99	-3.7	14,708,790	-17.8
49	Jet	246.96	4.7	4,436,852	6.9
50	McCall's	246.34	-3.1	19,223,693	-1.7
51	Car & Driver	242.15	-11.1	11,629,247	1.7
52	Ski	241.64	-2.8	5,268,146	1.4
53	Black Enterprise	238.31	10.5	3,834,691	23.5
54	Harper's Bazaar	236.40	-15.2	6,781,917	-16.2
55	Ebony	234.80	-6.6	9,007,281	-4.9
56	Conde Nast Traveler	233.89	4.9	7,163,991	7.9
57	Inc.	230.41	16.8	5,746,962	6.8
58	Gourmet	219.91	-9.9	6,813,617	-7.9
59	Country Living	216.51	-2.9	9,852,972	1.7
60	Parade*	215.07	9.4	112,137,640	11.8
61	Mademoiselle	208.55	-19.8	7,973,312	-14.5
62	Seventeen	206.44	-12.3	6,794,475	-15.4
63	Road & Track	205.83	-14.8	7,122,174	-2.8
64	Delta Sky	203.78	5.6	6,179,975	12.5
65	Bassmaster	199.92	-22.6	4,379,198	-16.9
66	Outside Magazine	196.28	18.2	4,420,803	53.0
67	Bon Appetit	194.86	-13.4	6,838,624	-6.0
68	Mirabella	193.20	-15.5	5,540,558	25.5
69	Four Wheeler	193.11	-10.7	1,542,942	-22.3
70	Reader's Digest	192.21	-8.3	23,863,673	3.8
71	Esquire	188.60	-2.4	6,715,548	11.1
72	USA Weekend*	187.89	25.0	42,156,130	48.5
73	Parenting	186.55	14.7	4,927,561	32.8
74	San Francisco Focus	185.95	0.5	1,290,272	2.2
75	Self	184.81	-7.4	7,701,759	-7.5
76	Shape Magazine	184.46	22.0	3,392,266	28.4
77	Omni	182.33	2.8	4,860,906	3.4
78	Penthouse	180.82	1.7	7,196,778	1.4
79	Sports Afield	178.14	-7.6	3,711,250	-5.5
80	Entertainment Weekly	177.98	-4.1	5,602,737	38.7
81	Bicycling	177.95	-12.3	3,195,440	2.9
82	Smithsonian	174.22	-16.1	8,204,785	-8.5
83	Motor Trend	170.46	-17.1	7,774,823	0.0
84	Field & Stream	170.44	-12.4	7,415,018	-15.5
85	Essence	169.34	2.9	5,409,717	21.6
86	Northwest World Traveler	167.63	37.2	3,205,364	3.9
87	Metropolitan Home	167.35	-2.6	5,757,891	-6.1
88	Automobile Magazine	166.52	-1.4	4,721,250	6.6
89	Kiplinger's Personal Finance	165.13	13.3	4,775,500	13.9
90	Working Woman	163.78	-23.4	5,805,737	-14.8
91	Outdoor Life	162.10	-12.1	5,175,281	-13.1
92	House Beautiful	162.07	1.9	6,036,157	-3.7
93	Yankee	161.55	-2.9	1,694,730	-22.7
94	Atlantic	157.02	4.9	3,097,928	16.2
95	Longevity	156.22	25.0	1,235,125	35.9
96	Popular Science	155.43	4.9	5,542,419	14.1
97	HG	153.63	-20.5	4,550,527	-12.7
98	Compute	153.27	-28.8	1,349,708	-28.6
99	M Magazine	151.67	-0.6	2,230,257	6.9
100	Tennis	149.78	-1.7	5,247,996	2.8

Percent change compares January-March in 1992 with 1991. *National Sunday magazine, tracked separately by PIB. Source: Publishers Information Bureau

ON ACTIVES

FOUR PASSIONS
ONE LIFESTYLE

RODALE
ACTIVE
NETWORK

Contact George Hirsch,
Group Publisher (212) 573-0334.

Source: MRI Fall, 1991.

Carson legacy

(Continued from Page 10)

tial of a great show on this emerging network is. I have no concern whatsoever about being able to sell the time we'll have in this show."

Although a final format hasn't been set for the Chevy Chase show, Mr. Kellner said it would be a "comedy show with some talk elements" that would probably air for 1 hour six nights a week (five orginals and one repeat).

Noting that Fox's planned national news programming would air at 10 p.m. (ET), Mr. Kellner said Fox is considering an 11 p.m. or 11:30 p.m. slot for the Chevy Chase show. An 11 p.m. slot would pre-empt much of the late night competition, which normally starts at 11:30 p.m. "The Tonight Show" begins at 11:35.

Aside from Mr. Carson's personality, Mr. Kellner said NBC's "The Tonight Show" will lose Mr. Carson's ability to attract the best talk show guests and interview subjects, which Fox plans to take advantage of with the Chevy Chase show.

Fox executives have been tracking a long list of personalities and performers as potential late night hosts for about four years but were waiting for the right time before proceeding, Mr. Kellner said.

"We've been monitoring the talent pretty closely, but we didn't have Chevy on our list, because we didn't think we could get him," he explained.

Fox executives tried to woo NBC's other late night talk show host, David Letterman, to launch a late night show on Fox, as did ABC. But executives familiar with Mr. Letterman's contract say he's locked up for two years.

A senior ABC executive also said Mr. Letterman has decided to stay at NBC, because he believes NBC will be purchased by Paramount Communications.

Mr. Letterman reportedly was angered when NBC passed him over and chose Mr. Leno to succeed Mr. Carson as host of "The Tonight Show."

But the ABC executive said Mr. Letterman believes Paramount executives will make suitable amends. Paramount Chairman Brandon Tartikoff previously was president of NBC Entertainment and has close ties to Mr. Letterman.

While declining to comment on Fox's negotiations with Mr. Letterman, Mr. Kellner said Fox's research indicated Mr. Chase is the ideal candidate for the new Fox show. The actor has strong appeal among younger demographics, an area where Fox has carved its programming niche, he said.

Indeed, according to data from Marketing Evaluations TVQ Services, Mr. Chase ranked higher in popularity than all the current major late night talk show personalities.

Among adults 18 to 34, Mr. Chase scored a 38 on Marketing Evaluations' Performer Q index. The Q scores are based on a personality's familiarity and popularity.

The next most popular late night personality among 18-to-34-year-olds was Mr. Leno, with a 27 Q rating.

Mr. Carson had a 25, Mr. Letterman a 24, Arsenio Hall a 23 and Dennis Miller a 20.

"Fox definitely made the right decision with Chevy Chase," said Henry Schafer, exec VP at Marketing Evaluations. Mr. Chase's "appeal is the highest among younger people. Jay Leno and Johnny Carson are most popular with the 55-plus audience."

Although Mr. Chase currently doesn't have a TV show, his popularity has been reinforced by his movies and reruns of the "Saturday Night Live" TV series, said Mr. Schafer, a former research executive at ABC.

"The old 'Saturday Night Live' shows are getting a lot of play on cable, particularly the younger-skewing cable like Nickelodeon and MTV," he said. "That exposure is reintroducing him and re-exposing him all the time to a new generation of viewers."

Mr. Kellner said Fox would be able to exploit Mr. Chase's appeal among young viewers because the network's prime-time series are most popular with younger viewers.

"We have the ability to promote a late night show as much as any network has ever had it, because the core audience is going to be 18 to 34 and 18 to 49, with a lot of male viewing. This is a perfect fit for us," Mr. Kellner said.

Meanwhile, several syndicated late night series are poised to make their debuts. Multimedia Entertainment will introduce the "Rush Limbaugh" show, and BYCA Television's "The Byron Allen Show" will be expanded to a weeknight strip from a once-a-week series.

Those new syndicated shows are going after time slots on independent TV stations and network affiliates. They join Paramount's "The Arsenio Hall Show" and Tribune Entertainment's "The Dennis Miller Show."

While NBC isn't expected to lose many "Tonight Show" clearances initially because of Mr. Carson's retirement, CBS and ABC may be vulnerable.

Although CBS has had marked gains in its late night performance with the "Crimetime After Primetime" lineup, the shows still have a relatively low ratings base. Many affiliates may feel they can do better with one of the new syndicated shows.

ABC's "Nightline" still performs well, particularly with upscale demographics, but ABC has had a hard time developing a suitable show to follow it, and there have been rumors the network might drop the news series in favor of a talk or entertainment format.

As for Mr. Leno's performance as host of "The Tonight Show," only time will tell.

Mr. Carson—drawing an analogy to speculation when he took over from hugely popular Jack Paar—once said: "They'll be saying, 'Who could follow Carson?' just like they said, 'Who could follow Paar?' Well, believe me, somebody can—and will."

But the question is, is that somebody Jay Leno? □

Raymond Serafin contributed to this story.

Carson's victims

A list of the most significant talk show programs that tested the strength of "The Tonight Show."

Show	Rating	Carson's rating
"The Joey Bishop Show" (ABC) May '67 to Dec. '69	3.7	7.3
"The Merv Griffin Show" (CBS) Aug. '69 to Feb. '72	4.5	7.5
"The Dick Cavett Show" (ABC) Jan. '73 to Dec. '74	3.4	7.9
"Thicke of the Night" (Syn.) Sept. '83 to Sept. '84	1.0	6.6
"The Late Show Starring Joan Rivers" (Fox) Oct. '86 to May '87	2.6	7.0
"The Arsenio Hall Show" (Syn.) Jan. '89 to present	3.2*	5.2
"The Pat Sajak Show" (CBS) Jan. '89 to April '90	3.0	5.5
"The Ron Reagan Show" (Syn.) Aug. '91 to Dec. '91	0.8	5.0
"The Dennis Miller Show" (Syn.) Jan. '92 to present	1.7	5.2

*Season-to-date (9/8/91 to 3/22/92) average. All ratings represent head-to-head comparisons based on Nielsen Television Index. Source: NBC

Late night ratings summary

Program	Household rating/share 1990-91	1991-92	% chg
Saturday Night Live (NBC)	7.3/22	8.4/24	15.1
Tonight Show (NBC)	4.9/16	5.0/16	2.0
Nightline (ABC)	5.8/16	4.6/13	−20.7
Arsenio Hall (Syn.)	3.4/12	3.3/12	−2.9
David Letterman I (NBC)	3.1/15	3.0/14	−3.2
Late Night I (CBS)	1.7/8*	2.9/10	70.6
Comic Strip Live (Fox)	2.7/7	2.8/7	3.7
David Letterman II (NBC)	2.5/15	2.5/15	—
Friday Night Videos (NBC)	1.8/12	1.6/11	−11.1
ABC's In Concert (ABC)	—	1.6/6	—
Later With Bob Costas (NBC)	1.5/12	1.4/11	−6.7
Late Night II (CBS)	0.9/7*	1.0/6	11.1

*Last season, "Late Night I" and "Late Night II" aired one-half hour later because of the canceled "America Tonight," which aired at 11:30 p.m. (ET). Source: N W Ayer analysis of Nielsen Media Research data

Top 10 advertisers

Spending on late night network programming in millions of dollars.

Advertiser	1990	1991	% chg
Sears, Roebuck	$23.3	$21.5	−7.7
Philip Morris	13.8	20.5	48.6
Procter & Gamble	13.7	17.7	29.2
Anheuser-Busch	13.1	14.1	7.6
General Motors	15.2	12.8	−15.8
AT&T	15.2	11.9	−21.7
Toyota	14.3	11.3	−21.0
Walt Disney Co.	8.7	10.6	21.8
Ford Motor Co.	10.3	9.1	−11.7
Bristol-Myers/Squibb	11.6	7.9	−31.9

Source: Arbitron's MediaWatch

Fox commits to HDTV

LOS ANGELES—Fox Television Stations is the first station group in the U.S. to commit to high-definition TV technology.

Fox entered into a deal with Harris Allied Broadcast Division for the advanced transmitters for its stations in seven markets. □

AT THE NEW YORK GAMES, EVEN THE TV AVAILS ARE GOING FAST.

Attention Network Buyers!

Carl Lewis, Jackie Joyner-Kersee, Leroy Burrell and Mary Decker Slaney are in such a hurry to compete that they are getting set to preview their Barcelona performances at THE NEW YORK GAMES. On NBC from 1 pm to 2 pm Sunday, May 24.

Network buyers on their marks will get high visibility on the broadcast of this top outdoor track & field meet. Now running for the third consecutive year on network TV, THE NEW YORK GAMES have shown solid ratings scores each year.

That's the good news. The only hurdle is that just a few TV avails are left. So take a cue from some of the world's fastest athletes—hurry!

To get a jump on the competition, call Scott Lange at the New York Road Runners Club at 212-860-2477.

NEW YORK GAMES mita

The Barcelona Preview

During 1991, no newspaper in America had more total retail advertising linage than:

THE ORANGE COUNTY Register

Represented by CWO&O

Source: S&MM, LNA, Jan.- Dec. 1991

Give your product away — on television game-shows.

It's the ultimate in low-cost mass exposure. We provide a complete service to all TV game-shows. Write for details.

Game-Show Placements, Ltd.
7011 Willoughby Avenue
Hollywood, CA 90038
(213) 874-7818

Purina bites back into pet food

O.N.E. lines for cats and dogs spell S-U-C-C-E-S-S over 'professional' competitors

By Julie Liesse

In the mid-1980s, upstarts like Iams Co. and Hill's Pet Products began gnawing into Ralston Purina Co.'s pet foods business. Now the top dog is snarling back.

Dog and cat foods account for 24% of Ralston Purina's sales of $7.4 billion, 40% of profits and a big chunk of corporate ego. But independently owned Iams and Hill's, a $500 million subsidiary of Colgate-Palmolive Co., were luring pet owners away from supermarkets with expensive cat and dog foods, each sold with the imprimatur of "professionals"—breeders, veterinarians and pet shop owners.

Purina saw its market-leading 25% to 30% share of the pet food market under attack.

In reaction, Purina's Pro Plan line hit shelves in pet shops and feed stores in 1985, with the coveted recommendation of top dog breeders—a now all-too-familiar ploy of Iams and Hill's and a passel of regional brands. Hill's used "veterinarian recommended" in its Science Diet logo, while Iams advertised its "special pet foods sold only at special stores."

By 1990, Purina wrote its first "prescription" for pet food sold only through vets, Clinical Nutrition Management, challenging Hill's very successful Prescription Diet.

By 1991, Hill's, Iams and other smaller brands were siphoning off more than $1 billion in pet food sales from supermarkets—representing potential additional sales of 15% to the retail outlets.

So last spring, Purina unleashed the final, critical phase of its battle plan. Wielding a marketing budget of $40 million to $50 million, the company expanded its 4-year-old Purina O.N.E. dog food to compete head to head with Iams and Hill's Science Diet but on its battlefield of choice: the supermarket.

If Science Diet could offer "lifestage" pet foods—different chows for puppies, senior dogs and overweight canines—then Ralston could offer Purina O.N.E. (Optimum Nutritional Effectiveness) in puppy, adult and Lite Dog varieties. If Iams' distinct kitten and cat foods could lure pet owners to try "special foods sold only at special places," well, Purina could go O.N.E. better with two cat food formulas, too.

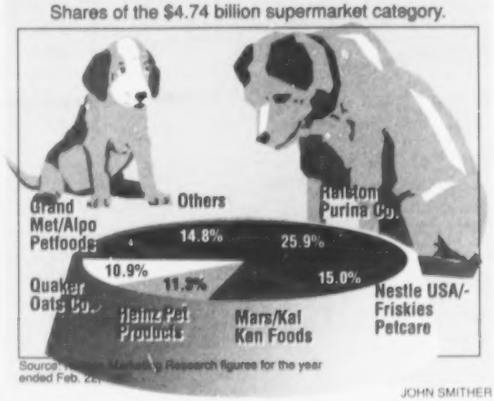
Better yet, the O.N.E. products would be 20% to 25% less expensive than Iams or Science Diet—and spare the buyer a special trip to a "special store."

There were a couple of tricky parts: Retailers had to be convinced O.N.E.—now with 17 different items instead of the original two—would pay off enough to justify the additional shelf space. Then, of course, this was a recession, hardly an environment for a superpremium line.

A year later, it looks like Purina barked up the *right* tree.

Who's top dog in pet food sales

Shares of the $4.74 billion supermarket category.



Source: [illegible] Research figures for the year ended Feb. 2[illegible]

JOHN SMITHER

In just one year, O.N.E. dog food sales alone jumped 36%, making Purina O.N.E. a $67 million business—much of the new business presumably coming at the expense of Iams and Hill's.

"What Ralston has said is that consumers have traded down from the more expensive specialty pet store brands to the high-end supermarket products, and that's where they've picked up volume for O.N.E.," said Michael Mauboussin, County NatWest Securities USA analyst.

That's great news for Purina, other pet food marketers and retailers. U.S. pet owners spend $6 billion a year on supermarket pet food. But marketers have fought for each scrap of profit; costly trade promotions and price wars have mauled the bottom line.

Insiders estimate Mars Inc. has lost millions of dollars helping its Kal Kan Foods make the Pedigree and Whiskas brand names leaders in canned pet foods. The more consumers choose superpremium, high-profit brands like O.N.E. instead of lower-price mainstream brands like Alpo and Purina Dog Chow, the more profit is available in the category.

Supermarket managers understand that and drool at getting some of that $1 billion back, too. You can now find more than 4,000 Purina O.N.E. "nutrition centers"—or sometimes a Vons, Jewel or Kroger nutrition center amply stocked with O.N.E.—in supermarkets around the country.

"Would grocery stores have accepted this kind of line four years ago? No," said Terry Block, VP-pet food marketing at Purina. "But we started thinking about how to approach this market in 1985, and with the original O.N.E. dog food, launched in 1987, we had laid a strong foundation for our success."

Purina continues to hit Iams and Hill's hard with wholesome actor Robert Urich and his golden retriever sidekick, Jake, who together pitch O.N.E. as "Second to none" on TV and in magazines. Scali, McCabe, Sloves, New York, handles the account.

And the leader isn't alone in targeting Iams and Science Diet: As the Purina O.N.E. offensive rolled out, Quaker Oats Co. simultaneously relaunched its 10-year-old Cycle brand with a new "Advanced Nutrition Formula," new packaging and new comparative ads—and a slightly higher

(Continued on Page 48)

CIRC, DEMOS, AND THE COMICS.

In other words, the largest circulation in the New York metropolitan area, the only circulation of any New York daily to grow in the last three years, and 2.2 million young, better-educated readers who appreciate the better things in life. Maybe your agency and your clients would appreciate running in a finer New York paper. Call us. We'll talk.

New York Newsday

Newsday

TRUTH, JUSTICE, AND THE COMICS.

AD REVIEW

Foundation's ad skirts tough abortion issues

Garfield

By Bob Garfield

He has a kind, handsome face and she is lovely in an unthreatening, Jane Pauley sort of way. As she pours his coffee, the soft dusty morning light bathes them in a nearly angelic glow. They're all smiles, comfortable in their sweatshirts and their lovely home, yet there is an odd emptiness to this scene.

What could possibly be missing?

The phone rings, and the husband volunteers to get it. The caller could be a direct marketer or the neighbor or Mom, but before a word is spoken somehow this couple knows that their prayers have been answered, their terrible void filled, their lives made whole.

Looking confirmingly at his wife, the husband says, "We have a daughter." Yes, it was the adoption agency. Yes, good things happen to good people.

"Last year," says the narrator, "over 50,000 women found families to adopt their unexpected children. They decided, instead of abortion, to tough it out and bring their babies into the world. They held to their belief that nothing is more precious than human life. To all those mothers, the families that adopted these children would like to say, 'Thank you.' "

The frame freezes as the new mother—now in a nursery holding her baby—looks up at her husband with an expression of love and joy, fulfillment and wonder, trepidation and awe.

Rating: ★ ★

"Life," says the announcer. "What a beautiful choice."

Soft images of a lovely couple in some ways distill—and in others obscure—the wrenching national debate over abortion.

Wow! The perfect case for adoption, distilled, crystalized and magnificently photographed in 37.2 seconds. What follows is 22.8 seconds more of direct-response pitch, flogging an 800 number and a book called "Journey to Life." But the heck with that.

By the time he's done, I don't want to order a book. I want to actually get pregnant, so I, too, can tough it out and give my baby to this beautiful and deserving lady, just so she'll look at me with her limpid blue eyes and say, "Thank you."

This euphoria lasts approximately 1 second. Then I remember that this is *advertising*, like those super glue spots showing men hanging by hard hats from girders and glue-repaired hammers hammering glue-repaired nails. Those are "Wow!" ads too, but they neglect to show what you get when you try to superglue your broken eyeglasses together, namely: a miraculously bonded thumb and forefinger and a broken pair of eyeglasses.

Hence the 800 number. The sponsor—the secretive Arthur S. De Moss Foundation—and the unnamed mystery admen who produced the spot need you to dial up before reality sets in. The reality is that this perfect case for adoption is just that: a perfect case, neglecting all of the not-so-pat situations which don't involve a healthy, white baby for America's Ideal Couple but which nonetheless constitute real life.

Furthermore, "What a beautiful choice" isn't so gentle, positive and non-confrontational as it first seems. While free of overt recriminations and "baby killer" talk, its heroic characterization of women who complete their pregnancies implies that women who choose abortions are therefore cowards. What pregnant woman—or girl—facing a life or death decision, needs some condescending man to tell her to "tough it out"?

Somebody on the so-called "pro-life" side of the abortion debate might not be insulted, but what becomes clear is this isn't an ad so much as a Rorschach test, in which the patient's interpretation of inkblots depends entirely on what's already in his head.

The De Moss Foundation cannot succeed if its advocacy merely separates the pro-choicers from the pro-lifers. The function of advertising, after all, is to persuade—not just to bathe sales pitches, and handsome couples, in the best possible light. □

How Burnett contended with Chicago Loop flood

CHICAGO—Wally Petersen, Leo Burnett USA's VP-communications, flew into O'Hare April 13, hopped in a cab and told the driver to take him to the Burnett building in the Loop.

"Where are you from? Another planet?" asked the surprised driver. The Loop was filling with water.

A breach in an underground tunnel system last week filled the tunnels and lower levels of many buildings with 250 million gallons of Chicago River water.

Most of the city's large agencies are located outside the Loop, and weren't affected. Although there was no flooding inside the Burnett building, operations did shut down the afternoon of April 13 at the city's request because of concerns about security and electricity in the area.

Shortly before noon, Bill Engelbrecht, exec VP-administration, took to Burnett's intercom system to ask all pregnant or disabled staffers to leave immediately. All others were advised to leave as soon as possible.

The building's emergency generator was readied in case of a power outage, but one never came.

The evacuation didn't mean that all work stopped. A group of Kellogg Co. executives and Burnett account staffers gathered up their research and moved their discussion of Kellogg's Frosted Flakes across the river to a table at Harry Caray's restaurant.

The agency's creative review committee jumped into cabs and reassembled at the Belden Stratford hotel on the city's dry North Side to evaluate new advertising for Kraft USA's Di Giorno pasta.

Focus groups on Green Giant, for which Pillsbury Co. executives were flying in, were moved to suburban Lincolnwood.

That night, the agency activated its Crisis Communications Plan to spread word Burnett would be open for business April 14. Key executives were notified first and asked to call members of their groups, who called others, and so on until all 2,300 employees had been called. □

Pet food

(Continued from Page 45)

price tag to make those retailers perk up.

The result has been the first good news for Quaker's downsized pet food division in five years. The $37 million Cycle relaunch paid off in a 25% boost in sales for its dry dog food, now a $105 million franchise.

"We're very happy with what's happened with Cycle. We see nutrition as a major long-term influence for people buying pet food, as it has been for other food products," said Doug Mills, senior VP-general manager of Quaker's pet food division.

Despite the success of O.N.E. and Cycle, Kal Kan may have bitten off more than it can chew with its category entry, Expert.

Launched about the same time, the Expert brand is broader than either Purina O.N.E. or Cycle; Expert includes not only dry cat and dog food but canned foods and dog biscuits as well.

Despite the additional products, and the promise of $50 million for marketing, Expert had total sales of about $36 million last year.

Kal Kan overreacted to Purina's expansion of O.N.E., industry executives say. While Purina tested canned foods and biscuits in one market—and pegged them as slow-moving items—Kal Kan opted to roll out its line without testing, in hopes of beating O.N.E. to market.

Kal Kan wouldn't comment on the product line.

"For the broader O.N.E. line, we knew we had a good idea from our market testing, and invested the time to introduce the right products into supermarkets," Mr. Block said.

Purina this month is out-Iamsing Iams with a new line of a lamb and rice formula foods, for older dogs and those with more delicate appetites.

Although rumors occasionally circulate about Iams moving its products into supermarkets, "We haven't seen them come this way yet," Mr. Block said. Whatever Iams does next, Purina is ready, he added.

"We were out on the edge with O.N.E. in 1987," Mr. Block admitted. "But we've had success with it, and at the same time we've been learning how to market to the specialty channel. Now we're playing in every outlet." □

Magic

(Continued from Page 1)

to use Mr. Johnson as a spokesman created a marketing opportunity for SkyBox, said President Frank O'Connell.

"While others were holding back, we're bolting forward," he said. "We're committed to him. We believe in Magic. We're not afraid."

Mr. Johnson, who's featured in several of the marketer's trading cards, is a good spokesman, Mr. O'Connell said.

"He's a wonderful athlete and human being," he said. "He relates to children . . . and our products go to children. Trading cards and Magic represent to them dreams and aspirations."

SkyBox plans to be involved with the Magic Johnson Foundation, which promotes AIDS awareness. There are discussions about a card to promote AIDS awareness to children, Mr. O'Connell said.

"We do not believe there is any reason to hide" Mr. Johnson's medical status, Mr. O'Connell said. "We got a chance to stand out and make a statement. We're not afraid to do so."

Advertising throughout the trading card industry is expected to take off soon. The endorsement deal with Mr. Johnson could make SkyBox the No. 1 advertiser in the trading card arena. Upper Deck

"While others were holding back, we're bolting forward."

Co. recently hired Chiat/Day/Mojo, Venice, Calif., to handle its estimated $5.5 million account, while Weiss, Whitten, Carroll, Stagliano, New York, was named first agency for Major League Marketing's estimated $3 million to $5 million account. Leaf and Fleer Corp. plan TV efforts in 1992, while Pro Set is seeking an agency (AA, March 9).

"The trading card arena is changing—it's going to become very advertised and promoted," Mr. O'Connell said. "At this point, it has not been a category that has been heavily advertised. It was very much limited to the collectors area. Now we're expanding out to the fan. Magic is a perfect spokesman because he is so well known."

The industry is estimated to reach $1.5 billion at wholesale in 1992, SkyBox said. Topps Co. was No. 1 with a 28% share in 1991, followed by SkyBox's 18%, the company said.

SkyBox has more than 20 lines of trading cards, including cards licensed by the National Basketball Association, National Football League and minor league baseball, as well as entertainment properties, such as Walt Disney Co., Star Trek and Marvel Comics. SkyBox is also the exclusive marketer of U.S. Olympic trading cards.

A series featuring the 1992 U.S. Olympic basketball team, which includes Mr. Johnson, will be out in June and is likely to be featured in SkyBox advertising. □

Bradley Johnson and Kate Fitzgerald contributed to this story.

Pizza

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comply as well.

The independently owned Okeechobee Domino's, which has ordered its drivers not to chase Pizza Hut drivers if spotted, isn't bound by the corporate edict.

The practice has occurred infrequently, said Ginger Sherman, senior director-advertising and events for Pizza Hut, but often enough to leave a bad taste in the mouths of officials at the PepsiCo unit.

"It's too bad that Domino's feels the need to resort to bush league behavior," Ms. Sherman said.

"We've obviously made them nervous, and this is how they've responded," she said.

Domino's won't check whether franchise stores keep using the tactic, since the matter is up to the individual franchisee, said Mike Jenkins, Domino's director-national public relations.

Corporate Domino's stores were told to quit the practice in March. □